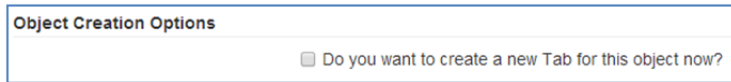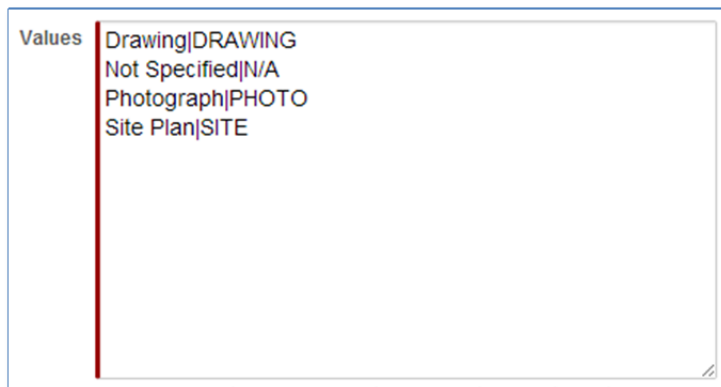# Opportunity Document Object

Creating and Populating the Opportunity Document Object

The Opportunity Document object is a child table of Opportunities and is simply a storage mechanism for all documents attached to a bid request email. We will create this object the same as all of the other ones we've created so far. After that, we'll need to edit all 3 screens for the Opportunity Object to include the linked documents. Be sure to set both Document and Dependent attributes. As you build the object, turn off the option to create a new tab.

Opportunity Document
Integer id **Text** name **Text** documentType **Text Area** description
Attributes
Attribute Document **Attribute** Dependent
Relationships
Relationship Opportunity
Permissions
Permission should be available to all
Views
View new **View** edit **View** view

Object Creation Options

☐ Do you want to create a new Tab for this object now?

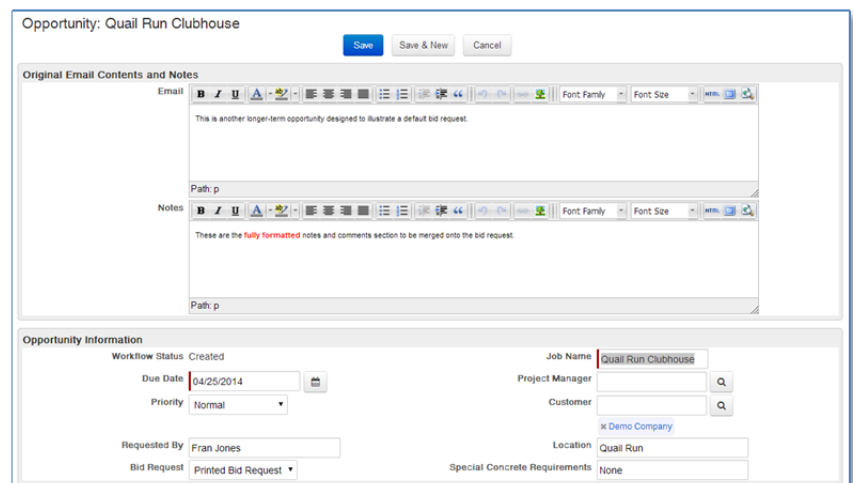The only field that needs to be created is the documentType field. Initially we will enter in the following values:

Values
```
Drawing|DRAWING
Not Specified|N/A
Photograph|PHOTO
Site Plan|SITE
```

We will add more values during the life-cycle of this project as they become relevant. Once you have the object created, it's time to start modifying the New/View/Edit screens for the Opportunity Object.

Opportunity View Screen

The edit screen is the easiest to modify so we'll start with it first. As our existing screen is already quite full, it makes sense to set up a new tab to store the documents. Unfortunately, if we edit the existing page, no tabs are present. The current view looks like this:

Opportunity: Quail Run Clubhouse

Save | Save & New | Cancel

Original Email Contents and Notes

Email
This is another longer-term opportunity designed to illustrate a default bid request.

Path: p

Notes
These are the fully formatted notes and comments section to be merged onto the bid request.

Path: p

Opportunity Information

Workflow Status Created

Due Date 04/25/2014

Priority Normal

Requested By Fran Jones

Bid Request Printed Bid Request

Job Name Quail Run Clubhouse

Project Manager

Customer

✕ Demo Company

Location Quail Run

Special Concrete Requirements None

Edit this data entry form as normal and click on the words "Edit Opportunity" to select the entire page, as shown:

That will display the Page Properties where you can turn on tabs. (Upper left hand corner). Turn on the Enable Tabs check box, and you will see the following:

Tab 0 is the existing tab. Click on it and change the Tab Name property to "Opportunity". The click on the "+ Add Tab" button to display a "Tab 1". Click on Tab 1 and change the Tab Name to "Documents".

While still on the Documents tab, and in Edit Screen mode, drag a new section onto the tab, with the usual section settings and give it a Title of "Document List".
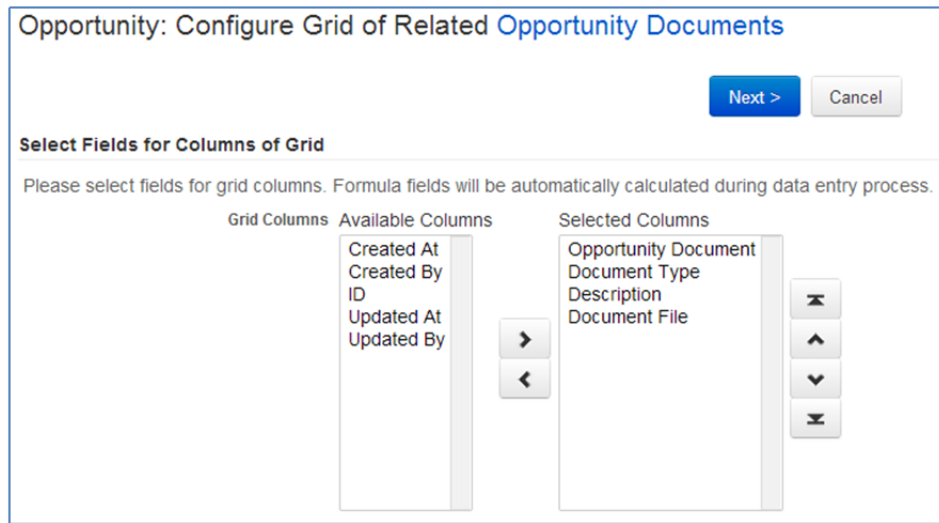
Next, grab a Grid Control Component and drag it into the new section. Save your settings. Once done, you will now have a Documents tab with a Document List section that needs to be configured.

Click on the ⚙ button to configure the grid and select the correct relationship and press the "Next" button.

Select Related Object for Grid

Relationship | Opportunity Documents - Opportunities ▾

Configure the columns. The following are the columns I selected:

Opportunity: Configure Grid of Related Opportunity Documents

[Next >] [Cancel]
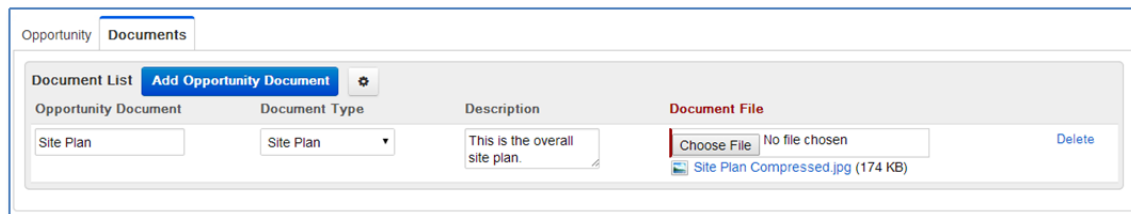
Select Fields for Columns of Grid

Please select fields for grid columns. Formula fields will be automatically calculated during data entry process.

Grid Columns | Available Columns | Selected Columns

Available Columns:
Created At
Created By
ID
Updated At
Updated By

Selected Columns:
Opportunity Document
Document Type
Description
Document File

For now you can ignore the last screen and simply click "Save". The tab, with an uploaded document now looks like this:
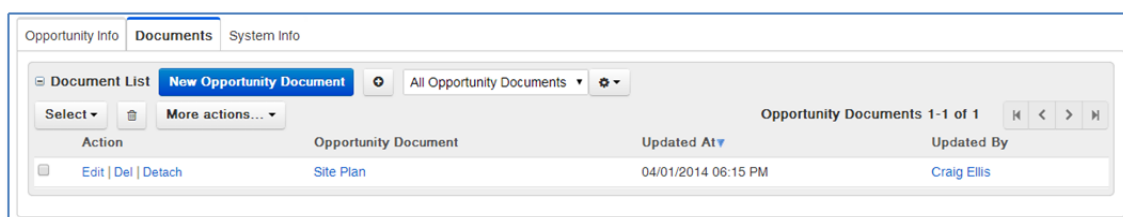
| Opportunity | **Documents** |

Document List **Add Opportunity Document** ⚙

Opportunity Document	Document Type	Description	Document File	
Site Plan	Site Plan ▾	This is the overall site plan.	Choose File No file chosen 🖼 Site Plan Compressed.jpg (174 KB)	Delete

If you add a document and then save it, you'll be returned to the VIEW screen. You will likely see that the "Opportunity Documents" section was added to the bottom of this screen. We need to do two things; 1) move the documents to their own tab and 2) configure the view to include relevant columns.

In order to "move" the document list to the new tab, you need to simply delete that section from the main tab. After you create the new tab, and added/edited a new section, drag and drop the Component "Related Opportunity Document Records". Click "Save". Your section should look like this.

| Opportunity Info | **Documents** | System Info |

⊟ Document List **New Opportunity Document** ⊕ All Opportunity Documents ▾ ⚙▾

Select ▾ 🗑 More actions... ▾   Opportunity Documents 1-1 of 1 |◄ ◄ ► ►|

	Action	Opportunity Document	Updated At▼	Updated By
☐	Edit | Del | Detach	Site Plan	04/01/2014 06:15 PM	Craig Ellis

Last thing to do is edit this grid view as normal and set the following columns:

The final page should look something like this: